

CMS Net

Client Eligibility

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Legend

In procedures on the following pages, you will see various symbols used.

- ✓ When describing a procedure, the check mark indicates the result of an action.
 - ➡ The arrow indicates a content note.
-

Client Eligibility

Overview

This document provides information about the Client Eligibility screen that allows users to determine patients' overall CCS eligibility.

Client Eligibility Display Only Screen

Only *authorized* users can modify data on this screen; otherwise, this screen is Display Only as shown below and “Display Only” will be in the screen title. (see example).

Users can scroll through the Eligibility History section.

CMSNET	CLIENT ELIGIBILITY DISPLAY ONLY				CMSCE-99	
Pt Nm:	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	CCS#:	9999999	CIN:	99999999X	
Gender:	X	DOB:	99/99/9999	Lgl Co:	XXXXXXXXXX	
		REG=	XXXXXXXXXXXX	MED=	X F/R=X	

Steps to Access the Client Eligibility Screen

Step	Action
1	From the Primary Menu, select Eligibility. Press <Enter>. ✓ The Patient Identification screen displays.
2	Identify and select the patient.
3	Select program eligibility date range from the pop-up message. Press <Enter>. ✓ The Eligibility Menu screen displays.
4	Select Client Eligibility. Press <Enter>.

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Client Eligibility, Continued

Client Eligibility Screen Example

Only authorized users can edit the Client Eligibility screen. (Regional Office & Independent Counties). Otherwise, the screen is Display Only.

From the Client Eligibility Menu, access this screen.

- ➡ Use the < Down Arrow > to move from field to field. Required fields or fields that the user can change are **bolded**.

CMSNET	CLIENT ELIGIBILITY	CMSELIGXX-99
Pt Nm:	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	CCS#: 9999999 CIN: 99999999X 9
1) Gender:	X DOB: 99/99/9999 Lgl Co: XXXXXXXXXXXX REG=XXXXXXXXXX MED=X F/R=X	
2) Pgrm Begin Date	99/99/9999 End 99/99/9999 CCS Elig Status XXXXXXXXXXXXXXXXXXXXXXXX	
3) Case Status	XXXXXXXXXXXXX+	4) Case Type XXXXXXXX+
5) CCS Elig Status	9XXXXXXXXXXXXXXXXXXXXX+	
6) Elig Start Date	99/99/9999 7) Date Closed 99/99/9999	8) Date Denied 99/99/9999
9) Reason Closed/Denied	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX+	
10) Determined By	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	11) Date Determined 99/99/9999
12) Comment	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	
CCS Eligibility History:		
13) Co S T CCS Elig Stat	Start Date Cl/Den Dt	Reason Closed/Denied
99 + + XXXXXXXXXXXXXXXX+	99/99/9999 99/99/9999	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX+
99 + + XXXXXXXXXXXXXXXX+	99/99/9999 99/99/9999	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX+
99 + + XXXXXXXXXXXXXXXX+	99/99/9999 99/99/9999	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX+
99 + + XXXXXXXXXXXXXXXX+	99/99/9999 99/99/9999	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX+
99 + + XXXXXXXXXXXXXXXX+	99/99/9999 99/99/9999	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX+
14) Last Update By	XXXXXXXXXX1XXXXXXXXXX2XXXXXXXXXX3	15) Date 99/99/9999

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Client Eligibility, Continued

Client Eligibility Field Descriptions

The following table describes fields on the Client Eligibility screen.

FLD #	ELEMENT NAME	DESCRIPTION/COMMENTS
1	(header)	Display Only Standard patient header
2a	Pgrm Begin Date	Display Only Date populated from Eligibility screens
2b	End	Display Only Date populated from Eligibility screens
2c	CCS Elig Status	Required Status is populated when CCS Elig Status on this screen is saved
3	Case Status	User can select <ul style="list-style-type: none">• Active,• Closed or• Denied If any one of the eligibility statuses on the Eligibility screens has not been met, the user CANNOT select "Active". Case status displays on the Patient Registration Face Sheet. The Face Sheet automatically updates when the case status is changed.
4	Case Type	Required If Case Status is "Active", select one: <ul style="list-style-type: none">• New• Reopen• If Case Status is "Closed or Denied", this field is deactivated and current value is retained.

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Client Eligibility, Continued

FLD #	ELEMENT NAME	DESCRIPTION/COMMENTS
5	CCS Elig Status	Required If Case Status is "Active", select one: <ul style="list-style-type: none">• 9K CCS [choose this when CCS application and PSA signed]• 9M CCS – MTP Only [No financial required]• 9N CCS – M/C Only• 9R CCS - HF; Over Income for CCS Fin Elig
6	Elig Start Date	Required If Case Status is "Active", this date will default to the referral date from Patient Registration, however, the user can modify this date. No future dates unless case is closed for reason of "Aid Code Changed".
7	Date Closed	Conditional Required if Case Status is "Closed" No future dates allowed. Cannot be prior to the Elig Start Date (Field 6)
8	Date Denied	Conditional Required if Case Status is "Denied", this field is display-only and defaulted to the Referral Date on the Patient Registration Face Sheet (CMSFS-10). User can overwrite.

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Client Eligibility, Continued

Client Eligibility Field Descriptions (continued)

FLD #	ELEMENT NAME	DESCRIPTION/COMMENTS
9	Reason Closed/Denied	Required if Case Status is "Closed" or " Denied", a reason must be selected. <ul style="list-style-type: none">• Parents will handle privately• Referred to another treatment center• Death of a patient• Family covered by prepaid health plan• Unable to keep appointments• Other• Treatment Completed• Eligible condition cured• No treatment indicated at this time• Patient reached 21 years of age• Refused Services by a CCS Provider• Residence established in another county• Residence established in another state• No response at last known address• Medically ineligible• Financially ineligible• Aid Code Changed
10	Determined By	Required If Case Status displays "Closed or Denied," this field is. Otherwise, field is empty and deactivated.
11	Date Determined	Required If Case Status displays "Closed or Denied," this field is. Otherwise, field is empty and deactivated. Defaults to today's date; however, the user can change it NO future dates
12	Comment	Automatically populates to the Narrative. User can key up to three lines.

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Client Eligibility, Continued

Client Eligibility Field Descriptions (continued)

FLD #	ELEMENT NAME	DESCRIPTION/COMMENTS
13	Client Eligibility History	Displays Client Eligibility History.
	Co	Displays the legal county code.
	S	Display Only Displays the first letter that correlates Case Status 'A': Active, 'C': Closed, 'D': Denied
	T	Display Only Displays the first letter that correlates Case Type 'N': New 'R': Reopen
	CCS Elig Stat	Displays value that correlates to CCS Eligibility Status <ul style="list-style-type: none">• “9K CCS”,• “9M CCS – MTP Only”,• “9N CCS – M/C Only” or• “9R CCS – HF;Over CCS Fin Elig”
	Start Dt	Displays Eligibility Start Date; system validates the date. Start date cannot be prior to last closed date. User can modify.
	Cl/Den Dt	Displays the Closed Denied Date.
14	Last Update By	Display Only Displays the last user's name that modified any data.
15	Date	Display Only Displays the date of the last change.

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Client Eligibility Functions

Case Status Important Change

On the Patient Registration Face Sheet (CMSFS-10) Status field Pick List, the user can **no longer select** the three statuses--Active, Close, or Denied.

When selecting any of the three statuses on the Client Eligibility screen in the Case Status field, the system displays this selection on the Patient Registration Face Sheet (CMSFS-10) in Status.

Case Status Active

If the user attempts to select "Active", "Closed", or "Denied" they will receive the following message:

```
Reminder: Case Status is Active. Case must be Closed
before this field can be changed. Please go to the
Client Eligibility Screen to change the Case Status to
Closed.
(?) Enter
```

Case Status Closed

If Case Status is "**Closed**" on the Client Eligibility screen, the Status field on the Patient Registration Face Sheet (CMSFS-10) displays "Closed".

The user can change the status on the Patient Registration Face Sheet to another status (e.g. Reopen/Pending).

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Client Eligibility Functions, Continued

Editing History The most recent history data displays in the first row.

- Based on the Reason Closed/Denied field, the user can edit the current record and the most recent history record (top line).
- A user can *only* change history records for their own legal county or regional county.
- Users can edit the most recent history *only* when the Reason Closed/Denied is:

‘Residence established in another county’.

Closed Status There are two instances to be aware of when changing status to Closed.

Action/Result	
If...	Then...
Case Status is changed to ‘Closed’, and the Reason Closed/Denied <i>is</i> ‘Aid Code Change’	Upon saving, the system displays a message indicating that the user must enter a new aid code: “Reminder: With Reason Closed/Denied = ‘Aid Code Changed’ you must enter a new aid code with a new start date (?) Enter ➡ Selecting Enter returns the user to the Client Eligibility screen. The cursor lands in the CCS Elig Status field.
Case Status is changed to ‘Closed’ and the Reason Closed/Denied is anything <i>other</i> than ‘Aid Code Change’	A pop-up message displays asking the user if they would like to generate a NOA or MC2134. “Would you like to generate (?) NOA () MC2134 () Quit

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Client Eligibility Functions, Continued

Denied Status

Action/Result	
If...	Then...
The user selects Case Status Denied,	Upon saving, the system displays the following pop-up message: Would you like to generate a () NOA () CCS-72 () Quit

Status Active

Action/Result	
If...	Then...
The user selects Case Status Active,	Upon saving, <ul style="list-style-type: none">• The case has a “T” (temporary number). The system assigns the next available permanent number.• The Patient Registration Face Sheet is updated with the new case status to reflect the aid code.• The CES eligibility status is updated.

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Client Eligibility Functions, Continued

Action Menu Commands

The following table lists and describes the results of the three possible menu commands.

Command	Action/Result
Save	The Save command saves data on the screen. It will have different results depending upon the Case Status value.
Cancel	The system displays the Eligibility Menu and does NOT save data.
Quit	The system will close the Action Menu, and refreshes the Client Eligibility screen. It saves NO data.

Branch Menu

Three choices display on this narrative for Client Eligibility.

- () Mail Message for Client Eligibility
 - () Identify New Patient
 - () Quit
-

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Client Eligibility Functions, Continued

Changing Aid Code on Active Case

There are times when a client's aid code needs to be changed. For example, if the client's eligibility initially indicated (9N CCS-M/C ONLY) Medi-Cal Full Scope No Share of Cost, and the Application and Program Services Agreement were not present at the time the case was opened. When the Program Eligibility process is complete, the client's aid code should be changed to (9K-CCS).

Changing the aid code correctly will maintain a historical record of all aid codes assigned to the CCS client. To perform an aid code change, the current aid code assigned must be updated with an end date. This requires closing the case to one aid code and assigning a new start date for the new aid code. The steps are as follows:

Step	Action
1	From the Primary Menu, select Eligibility. Press <Enter>. ✓ The Patient Identification screen displays.
2	Identify and select the patient.
3	Select program eligibility date range from the pop-up message. Press <Enter>. ✓ The Eligibility Menu screen displays.
4	Select Client Eligibility. Press <Enter>. ✓ Cursor defaults to Case Status field.
5	Case Status Select Closed from the pick-list. Press <Enter>.
6	Date Closed Type the Case Closure Date . Press <Enter>.
7	Reason Closed/Denied Select Aid Code Changed as the Reason Closed/Denied from the pick-list. • Press <Enter>.

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Client Eligibility Functions, Continued

8	<p>Determined By</p> <p>Enter the name of the person that made the decision to close the case.</p> <p>Press <Enter>.</p>
9	<p>Date Determined</p> <p>Enter the date the decision was made to change the aid code. CMS Net auto-populates with today's date. You may override by deleting and typing a new date.</p> <p>Press <Enter>.</p>
10	<p>Comments – Optional free text. Automatically populates to the Narrative.</p>
11	<p>Reminder displays</p> <p>Reminder: With Reason Closed/Denied = ' Aid Code Changed',</p> <p>You must enter a new aid code with a new start date.</p> <p>Press <Enter>.</p> <p>✓ The Client Eligibility screen displays.</p>
12	<p>CCS Elig Status</p> <p>Select NEW aid code from the pick – list. Press <Enter>.</p>
13	<p>Elig Start Date</p> <p>The Elig Start Date auto-populates with one day past the closure date.</p> <p>Press <Enter>.</p>
14	<p>Comments – Optional free text. Automatically populates to the Narrative.</p>
15	<p>Press the Action Menu Key and Select Save.</p> <p>Press <Enter>.</p>
16	<p>Client Eligibility Branch Menu</p> <p>Generate the Client Eligibility narrative about the aid code change.</p>

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NOTES

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